

COMMONWEALTH OF VIRGINIA
WORKERS' COMPENSATION COMMISSION



WebFile Guide For
Professional Employer
Organizations

Instructional Guide for WebFile System

JULY 2009 EDITION

PREFACE

This Guide is designed to assist Professional Employer Organizations (PEOs) with using **WebFile**, the Virginia Workers' Compensation Commission's self-service PEO Registration and Reporting system. The Commission implemented this efficient, easy-to-use web-based system so that PEOs would have an online resource to manage registration and client reporting data filings. Questions about any of the information provided in this guide should be directed to webfilesupport@vwc.state.va.us.

WELCOME

Welcome to the Virginia Workers' Compensation Commission's **WebFile** system.

The WebFile Guide for PEOs provides the information and instructions necessary for navigating this web-based registration and reporting tool. It has been designed to be used in two different ways –

- the printed document may be used as a hard-copy comprehensive reference manual or,
- the electronic file may be used as an online reference guide by reviewing the Table of Contents section, which has been organized in terms of commonly-asked questions

If after reviewing the guide you do not find an answer to your question about how to use **WebFile**, please e-mail your questions to webfilesupport@vwc.state.va.us. You may also contact pocsupport@vwc.state.va.us to inquire about the registration and reporting process.

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WebFile ACCESS

Requesting Access

To request access send an e-mail to WebFilesupport@vwc.state.va.us and include the following information:

- E-mail address
- Your first and last name
- Your phone number
- List of Federal Employer Identification Numbers (FEINs) for PEOs you will be administering
- Complete mailing address

WebFile SECURITY

The **WebFile** system has security protocols to help ensure that information remains confidential.

LOGON USERNAME

The logon username is the user's e-mail address. The e-mail address is also the data used to identify who created and has rights to update PEO information.

The logon username cannot be changed to be anything other than another e-mail address. If your e-mail address changes and you wish to update your profile, contact the Commission through webfilesupport@vwc.state.va.us.

PASSWORDS

All users are required to use a password along with the logon username. The initial password will be set up by The Commission. The user will then set up a new password at the time of registration.

Password Criteria

- **Must contain one special character (ie. @, #)**
- **Must be at least 8 characters in length**
- **Must have at least one number**
- **Must have at least one letter**
- **Must not have been used within the previous 12 months**

**Passwords expire every 90 days*

TIMEOUT FEATURE

The system has been set up with a 30 minute timeout feature. If there is no activity within 30 minutes, the user will receive a message notifying them that they need to log back in.



Timeout Feature: *The system has been set up with a 30 minute timeout feature. If there is no activity within 30 minutes, the user will receive a message notifying them that they need to log back in.*

LOG IN AND REGISTRATION

This module covers the procedure for logging into *WebFile* for the first time and completing the registration steps. The registration step is required in order to be able to view and manage your clients.

Registration is only required the first time a user logs in.



You should have received your logon and temporary password via e-mail. If you have not, then submit an e-mail to webfilesupport@vwc.state.va.us.

Applicable Roles: PEO Administrator User

Prerequisite Actions: User has been set up in system and a confirmation e-mail has been sent.

Business Scenario: User has received e-mail with logon and temporary password.

1. Go to new website at: <https://webfile.workcomp.virginia.gov>
2. Log into *WebFile*



3. Enter login username and password

4. Because this is your first time logging in, you will need to complete the registration page



This symbol  next to a field indicates a required field.

5. Set up a new password. Make sure to create a password that is at least 8 characters in length, has at least 1 number, at least one letter, at least one special character, and no spaces. The password is not re-usable for 12 months.



Passwords will expire after 90 days. If you have not reset your password before it expires you will need to contact the Commission at WebFileSupport@vwc.state.va.us

6. The next three fields capture responses to questions that will assist you in case you are ever locked out of the system or forget your password.

7. Pick a question and then supply responses in answer fields
8. Enter your information

1. Enter first name
2. Enter last name
3. Enter address



The address is validated against the US Postal Service database. A valid address is required for registration.

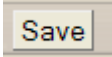
9. Review the Terms and Conditions by clicking on the words “**Terms and Conditions**” at the bottom left hand corner.

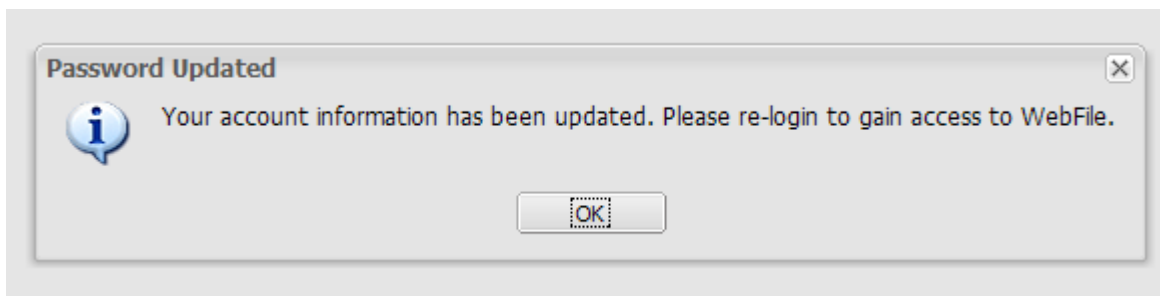
☐ Check this box to accept **Terms and Conditions**

10. After reviewing, check the box to accept the terms



The user will be asked to re-accept terms and agreements if the terms are changed significantly and/or user forgets password and request a reset.

11. Click the  button



Once saved, you will be directed to the main page, where you will need to log back in using your new password.

RESET YOUR PASSWORD

This module covers how to reset your password. The directions differ based on your scenario. Scenario 1 is for forgotten or expired passwords. Scenario 2 is for voluntarily resetting your password.

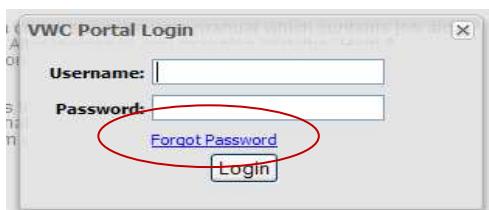
Applicable Roles: PEO Administrator User

Prerequisite Actions: User has been set up and has registered in *WebFile*.

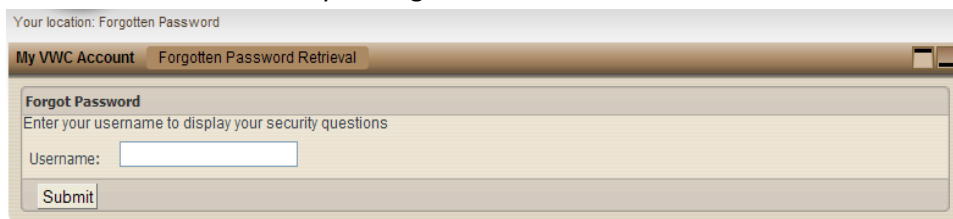
Business Scenario 1: User forgot their password or it has been 90 days and password has expired.

When the log in screen displays, you have the option to request a new password yourself.

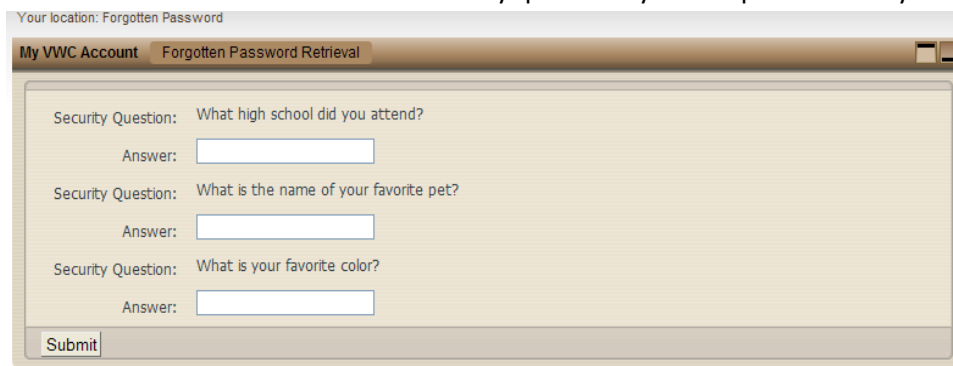
1. Click on FORGOT PASSWORD



2. You will be asked to enter your Logon Username. Click SUBMIT

A screenshot of a web browser window showing the "Forgotten Password" retrieval process. The page has a header "Your location: Forgotten Password". Below it is a tabbed interface with "My VWC Account" and "Forgotten Password Retrieval". The "Forgotten Password Retrieval" tab is active, showing a section titled "Forgot Password" with the instruction "Enter your username to display your security questions". There is a "Username:" input field and a "Submit" button at the bottom.

3. You will need to answer the three security questions you completed when you first registered.

A screenshot of a web browser window showing the security questions step. The page has the same header and tabs as the previous screen. The "Forgotten Password Retrieval" tab is active, showing three security questions: "What high school did you attend?", "What is the name of your favorite pet?", and "What is your favorite color?". Each question has an "Answer:" label and an input field. A "Submit" button is at the bottom.

4. Once you have entered your answers. Click SUBMIT

5. A confirmation message will appear.



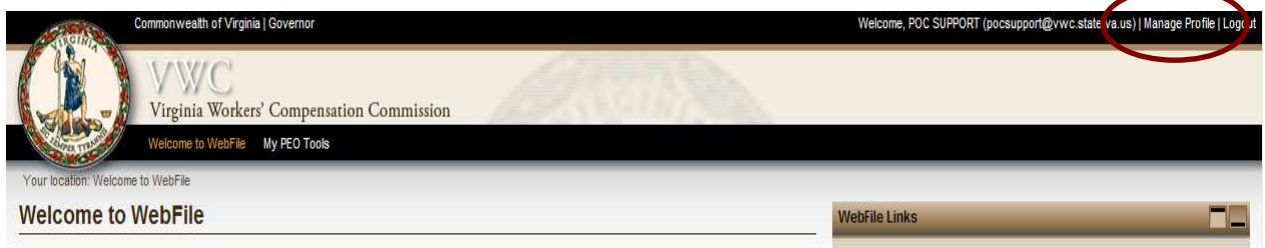
6. You will receive an e-mail with a temporary password.
7. When you login you will be required to re-register.



If you cannot remember the answers to your security questions then contact the Commission at WebFileSupport@vwc.state.va.us.

Business Scenario 2: User logs in with current password which has not expired but wishes to reset it.

1. From the main *WebFile* menu, click on Manage Profile



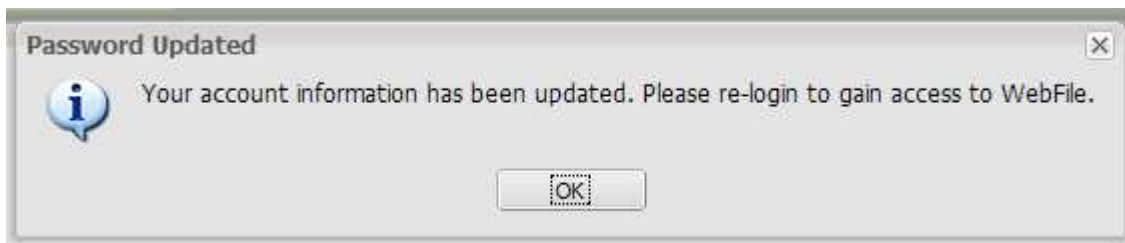
2. Manage Account Profile screen will display

3. Scroll down to the “Manage Account Password” section
4. Enter current password, then new password twice.



Make sure to create a password that is at least 8 characters in length, has at least one number, has at least one letter, has at least one special character, and has no spaces. The password is not re-usable for 12 months.

5. Click RESET.



6. Click OK to return to main *WebFile* page.
7. You will need to log back in with the new password.

UPDATING YOUR USER PROFILE

This module covers the steps for updating your own personal profile.

Applicable Roles: PEO Administrator User

Prerequisite Actions: User has been set up and has registered in *WebFile*.

Business Scenario: User needs to update address originally set up during registration process.

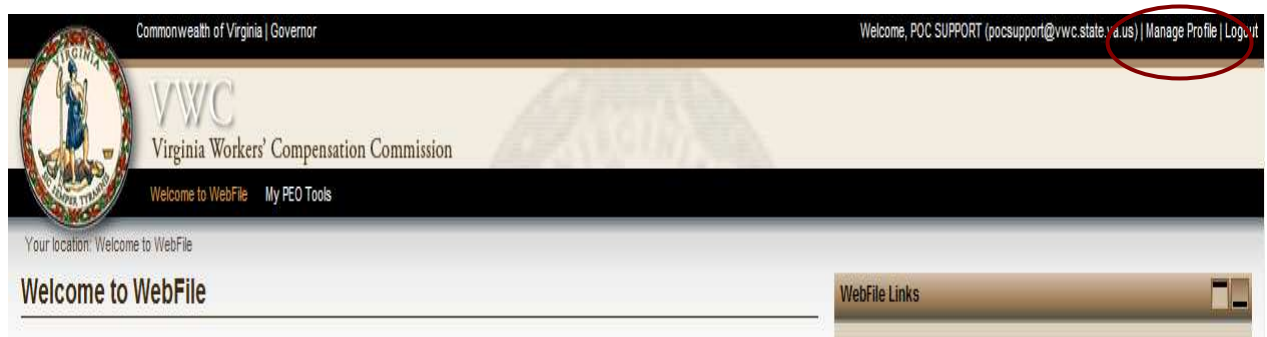
1. Go to new website at: <https://webfile.workcomp.virginia.gov>
2. Log into *WebFile*



3. Enter login id and password

The screenshot shows a 'VWC Portal Login' dialog box. It has two input fields: 'Email:' and 'Password:'. Below the password field is a link that says 'Forgot Password'. A 'Login' button is located at the bottom right of the dialog box.

4. From the main *WebFile* menu, click on Manage Profile



5. Manage Account Profile screen will display

My VWC Account Manage Account Profile

First Name:

Middle Name:

Last Name:

Mailing Address

Address: Street:

City:

State:

Postal Code:

Country:

☐ Check this box to accept **Terms and Conditions**

Save

6. Make whatever changes are necessary
7. Check the box to accept the Terms and Conditions
8. Click SAVE
9. A confirmation page will display

Your location: My VWC Account

My VWC Account Manage Account Profile

Successful Registration

Thank you for updating your account information.

[Back to Manage Profile](#)

Selecting PEO

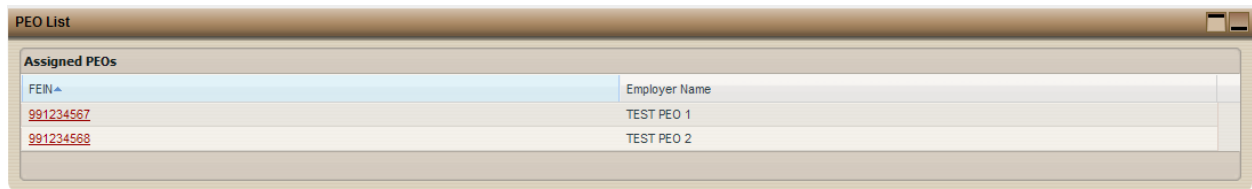
This module covers the functionality available for selecting a PEO to work with in WebFile.

Applicable Roles: PEO Administrator User

Prerequisite Actions: A PEO has properly registered with the Commission.

Business Scenario:

1. Login to WebFile.
2. Select desired PEO by clicking FEIN link (only PEOs who have registered multiple PEO FEINs with the Commission will see multiple rows on this form).



The screenshot shows a window titled "PEO List". Inside, there is a section labeled "Assigned PEOs" which contains a table. The table has two columns: "FEIN" and "Employer Name". There are two rows of data. The first row shows the FEIN "991234567" and the Employer Name "TEST PEO 1". The second row shows the FEIN "991234568" and the Employer Name "TEST PEO 2". The FEIN values are displayed in red text.

FEIN	Employer Name
991234567	TEST PEO 1
991234568	TEST PEO 2

Managing PEO Details

This module covers the functionality available for managing PEO details in WebFile.


Applicable Roles: PEO Administrator User

Prerequisite Actions: A PEO has properly registered with the Commission.

Business Scenario:

1. Navigate to appropriate PEO.
2. The PEO Summary is displayed.

The screenshot shows a window titled "PEO Summary" with a light blue header. Below the header, there are three fields: "Name: TEST PEO 1", "FEIN: 548888888", and "PEO Status: Registered". Below these fields are two expandable sections. The first section, "PEO Company Information", is expanded and shows four fields: "Approximate number of direct PEO employees in Virginia:", "Legal Status: Corporation", "Approximate number of client co-employees in Virginia:", and "Estimated Annual Payroll: \$100,000.00". The second section, "PEO Bureau of Insurance Data", is also expanded and shows three items: a checked checkbox for "Registered with the State Corporation Commission Bureau of Insurance as a Multiple Employer Welfare Arrangement (MEWA)", "Assigned Company Number: 0111", and two unchecked checkboxes for "Currently provides health benefits or health care services" and "Plans to offer health benefits or health care services in the future".

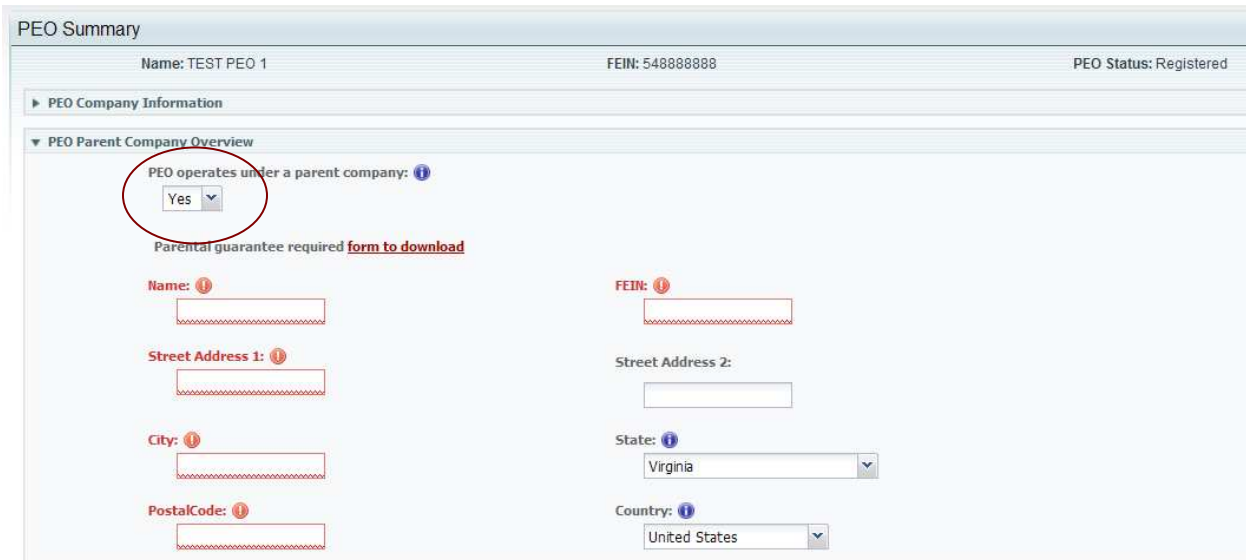
3. Click  and make the desired changes to PEO details.

The screenshot shows the same "PEO Summary" window, but now it is in edit mode. The fields are now interactive. The "PEO Company Information" section is expanded and shows "Legal Status:" with a dropdown menu set to "Corporation", "Approximate number of direct PEO employees in Virginia:" with an empty text box, "Estimated Annual Payroll:" with a text box containing "100000", and "Approximate number of client co-employees in Virginia:" with an empty text box. The "PEO Parent Company Overview" section is expanded and shows an unchecked checkbox for "PEO operates under a parent company". The "PEO Bureau of Insurance Data" section is expanded and shows "Registered with the State Corporation Commission Bureau of Insurance as a Multiple Employer Welfare Arrangement (MEWA):" with a dropdown menu set to "Yes", "Assigned Company Number:" with a text box containing "1111", "Currently provides health benefits or health care services:" with a dropdown menu set to "Yes", and "Plans to offer health benefits or health care services in the future:" with a dropdown menu set to "No".

4. Click  to save changes.

Adding a Parent Company

5. Under “PEO Operates under a parent company,” select Yes from drop down menu. Complete all required fields.



PEO Summary

Name: TEST PEO 1 FEIN: 548888888 PEO Status: Registered

PEO Company Information

PEO Parent Company Overview

PEO operates under a parent company: **Yes**

Parental guarantee required [form to download](#)

Name:

FEIN:

Street Address 1:


Street Address 2:

City:

State:

Postal Code:

Country:

6. Make the appropriate updates and click .



Please note that the the Parental Guarantee form must be dowloaded, completed, and submitted to the Commission if this PEO operates under a parent company.

Managing Contacts

This module covers the functionality available for managing PEO contact details in WebFile.

Applicable Roles: PEO Administrator User

Prerequisite Actions: A PEO has active contacts.

Business Scenario:


1. Navigate to appropriate PEO.
2. The contacts Tab is selected by default.

The screenshot shows the 'Contacts' tab selected in the top navigation bar. Below the navigation bar, the 'Address and Contact Information' table is displayed. The table has the following columns: Address Type, Name, Street Address 1, Street Address 2, City, State, Postal Code, and Country. The 'Physical' contact type is highlighted in blue. The 'Actions' row shows 'Edit Selected'.

Address Type	Name	Street Address 1	Street Address 2	City	State	Postal Code	Country
Insurance Agent	Insurance Agent	Address 1	Address 2	City	VA	23060	US
Registered Agent	Registered Agent	Address 1	Address 2	City	VA	23060	US
Designated Rep	Designated Rep	Address 1	Address 2	City	VA	23060	US
Physical		Address 1	Address 2	City	VA	23060	US

Actions: Edit Selected

Editing Addresses / Adding a Contact

3. Expand the desired Contact type by selecting  to the left of the desired Contact Type.
4. Click checkbox next to contact to update, and click "Edit Selected."

The screenshot shows the 'Contacts' tab selected in the top navigation bar. Below the navigation bar, the 'Address and Contact Information' table is displayed. The table has the following columns: Address Type, Name, Street Address 1, Street Address 2, and City. The 'Physical' contact type is highlighted in blue. The 'Actions' row shows 'Edit Selected'.

Address Type	Name	Street Address 1	Street Address 2	City
Insurance Agent	Insurance Agent	Address 1	Address 2	City
Registered Agent	Registered Agent	Address 1	Address 2	City
Designated Rep	Designated Rep	Address 1	Address 2	City
Physical		Address 1	Address 2	City

Actions: Edit Selected

5. Make the appropriate changes to the existing record. You may select “Add Contact” if this is a new contact, or “Delete Selected” if you would like to delete the record. Then select Submit.

Contacts Coverage Clients Annual Report

Edit Address/Contacts: Fill out address/contact information and click Submit

Assessment POC Address

Name *i*

Street Address 1 *i*

Street Address 2

City *i*

State *i*

Postal Code *i*

Country *i*

Contacts

Click Add Contact to add a contact. Do not want to delete and press Delete Select

Contact Type

Actions: Add Contact Delete Selected

Cancel Submit

6. You will receive the following confirmation message, based on the action you’ve taken:

Contacts Coverage Clients Annual Report

■ Successful save

■ Successful delete

Reminder – This section of WebFile covers how to Add, Delete, or Modify Contact types.

Managing Coverage

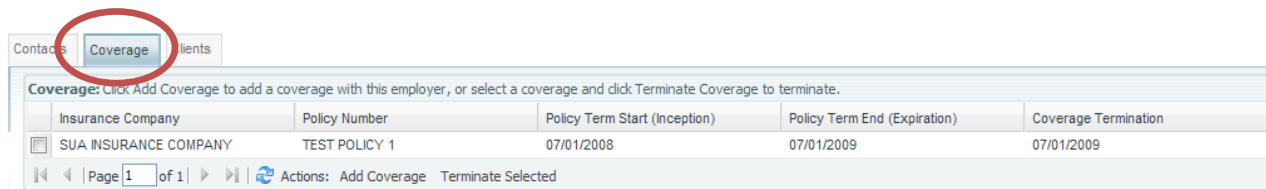
This module covers the functionality available for managing PEO Workers' Compensation coverage in WebFile.

Applicable Roles: PEO Administrator User

Prerequisite Actions: A PEO has active coverage.

Business Scenario:

1. Navigate to appropriate PEO.
2. Select the Coverage Tab.



3. You may either add coverage or terminate association of coverage with a PEO.



Please note that only policies that already exist in the Commission's systems (obtained from NCCI Daily Proof of Coverage product) may be associated with a PEO.

4. Select Add Coverage to add coverage to a PEO.



5. Enter required policy data.



The Insurance Company field uses a real-time search function which returns results after you have typed at least 3 characters. NCCI Code searches must match exactly to return positive results – this code may be found on the Declaration/Information page received from the Carrier.

6. If this is a master policy, Select the appropriate check box and enter the Effective date of the policy, and select Submit.



If a master policy is added for the PEO, each Client under the PEO must be updated with the same coverage data.

Managing Clients

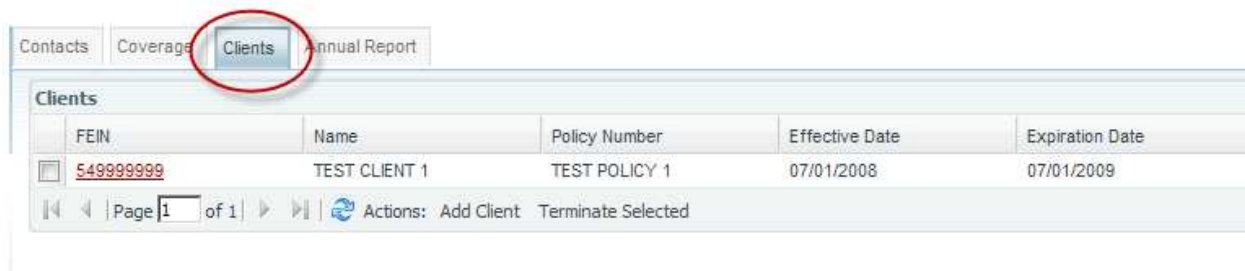
This module covers the functionality available for managing PEO clients in WebFile.

Applicable Roles: PEO Administrator User

Prerequisite Actions: PEO has existing clients.

Business Scenario:

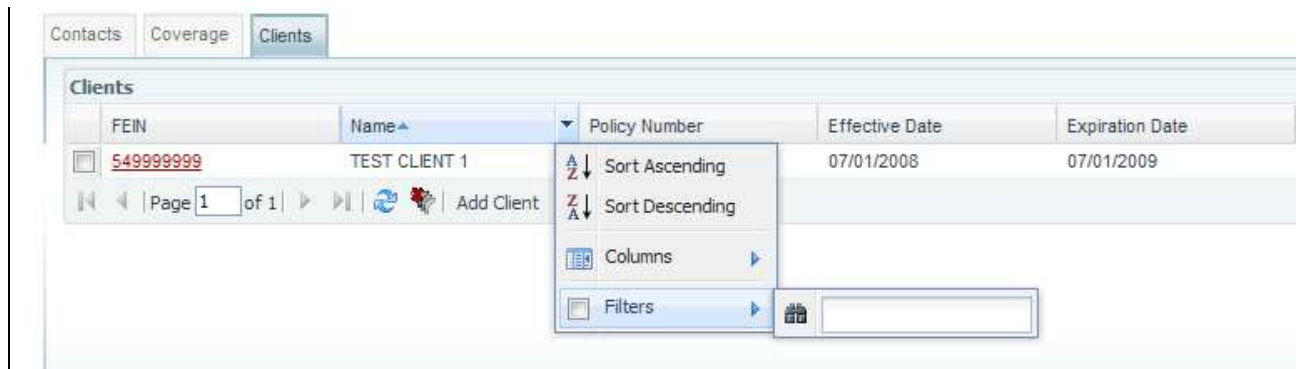
1. Navigate to appropriate PEO.
2. Select the Clients Tab.



3. You have three options:
 - a. Add a client
 - b. Terminate a selected client
 - c. Edit an existing client

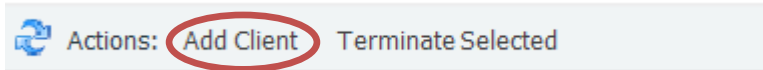


Navigating a long Client list can be made easier by using the Filter feature. This function is enabled on each column; filtered results will return as soon as the first character is entered in the search field.

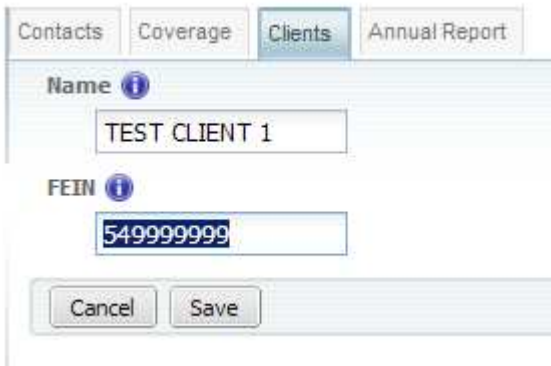


Adding a Client

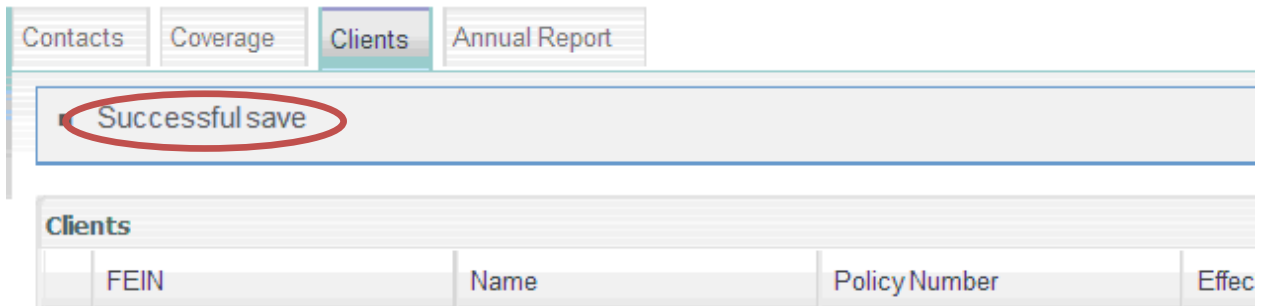
4. Select



5. Enter valid client data and select Submit.

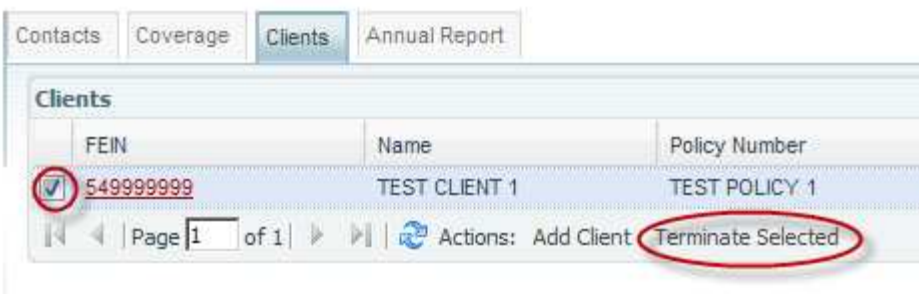
A screenshot of a web form titled 'Clients'. It has tabs for 'Contacts', 'Coverage', 'Clients', and 'Annual Report'. The 'Clients' tab is active. The form contains a 'Name' field with the text 'TEST CLIENT 1' and a 'FEIN' field with the text '549999999'. At the bottom are 'Cancel' and 'Save' buttons.

6. You will receive confirmation of the added Client



Terminating a Client

7. Select a client to terminate by clicking the check box next to its FEIN and select Terminate Selected



8. You will be prompted for The termination date, reason and coverage end date

Client Termination

Termination Date: 05/25/2009

Termination Reason: PEO Request

Date Insurance Coverage Ends: 05/29/2009

Submit

9. Enter the required information and select

Submit

Editing a Client

1. Select the Client to edit by clicking their FEIN

Contacts	Coverage	Clients	Annual Report
Clients			
FEIN	Name	Policy Number	Effective Date
<input type="checkbox"/> 549999999	TEST CLIENT 1	TEST POLICY 1	07/01/2008
Page 1 of 1 Actions: Add Client Terminate Selected			

2. The Client Summary screen is presented

■ Required information needed: Legal Status

Client Summary

Name: TEST CLIENT 1 FEIN: 549999999 Client Status: Compliant

Legal Status: Please select a Legal Status Addition Date:

Terminate client coverage: Yes Termination Date: Termination Reason: Please select a Termination Reason Insurance Coverage End Date:

Contacts Coverage Contract

Address and Contact Information

	Address Type	Name	Street Address 1	Street Address 2	City	State	Postal Code	Country
	<input type="checkbox"/> Insurance Agent	Insurance Agent	Address 1		City	VA	23060	US
	<input type="checkbox"/> RegisteredAgent	Registered Agent	Address 1		City	VA	23060	US
	<input type="checkbox"/> Designated Rep	Designated Rep	Address 1		City	VA	23060	US
	<input type="checkbox"/> Physical		Address 1		City	VA	23060	US

Actions: Edit Selected



Please note that the Legal Status and Addition Date are required. Complete this information and select Submit. Once entered this data can be Edited if necessary.



Client Status will be marked as either Compliant – indicating valid coverage – or Non-Compliant – indicating coverage is not valid.

3. You can also Maintain the Client's Contacts , Coverage and Contract information.

Contacts Coverage Contract

Address and Contact Information

	Address Type	Name
	<input type="checkbox"/> Insurance Agent	Insurance Agent
	<input type="checkbox"/> RegisteredAgent	Registered Agent
	<input type="checkbox"/> Designated Rep	Designated Rep
	<input type="checkbox"/> Physical	

Actions: Edit Selected



Managing Contacts functionality for the Client is the same as for the PEO. Please refer to [Managing Contacts](#) for further details.

Managing Client Coverage



Managing Coverage functionality for the Client is the same as for the PEO except for differences noted below. Please refer to [Managing Coverage](#) for further details.

4. Under the Coverage Tab select Add Coverage



5. The client Coverage Screen is Displayed; please make appropriate updates

Contacts Coverage Contract

Coverage: Populate coverage form and click submit

Coverage Matching Criteria

Insurance Company ⓘ

Please select a provider...

Policy Number ⓘ

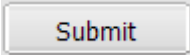
Policy Term Start (Inception) ⓘ

Policy Term End (Expiration) ⓘ

Virginia Coverage

Effective Date ⓘ

Cancel Submit

6. When complete select  to finalize changes.

Managing Contract Data

7. Under the Contract tab the status of individual statutory contractual requirements are displayed. Items that are true are noted with a check mark.

Contacts Coverage **Contract**

Contract Information: Click Edit to edit contract information

- ☒ 100% of this client's employees are leased from this PEO
- ☐ This client company hires sub-contractors
- ☐ Sub-contractors hired by this client are included in the coverage provided by this PEO
- ☒ A written contract exists between the PEO and the Client
 - ☒ The PEO has the executed contract or a copy thereof in its possession
 - ☒ Contract Date: 07/01/2008
 - ☒ Expiration Date: 01/01/2050
 - ☐ There are amendments to the original contract
 - ☒ The contract includes minimum services
 - ☒ A summary of the contract was given to the employees
 - ☒ A handbook was given to the employees

Edit

8. To edit the status of the Contract items select

Edit

9. The Client Contract Edit screen is displayed.

Contacts **Coverage** **Contract**

Contract Information: Fill out contract information form and click Submit

Are 100% of this client's employees leased from the PEO?:

Yes

Does this client company hire sub-contractors?:

No

Are sub-contractors hired by this client included in the coverage provided by this PEO?:

No

Does a written contract exist between the PEO and the Client?:

Yes

Does the PEO have the executed contract or a copy thereof in its possession?:

Yes

Contract Date

07/01/2008

Expiration Date

01/01/2050

Are there amendments to the original contract?:

No

Does the contract include minimum services?:

Yes


Was a summary of the contract given to the employees?:

Yes

Was a handbook given to the employees?:

Yes

Cancel Submit

10. Update the appropriate fields and select  when complete.

Managing Annual Report Filing Data

This module covers the functionality available for submitting the annual report data through WebFile.



Professional Employer Organizations (PEO) are required, pursuant to Section 65.2-803.1 of the Virginia Workers' Compensation Act, to file by January 31st an electronic annual report for the period ending December 31st of the prior year. The administrative, insurance information and payroll should be updated for each client company to reflect current state. For more information, please refer to VA Code § 65.2-803.1 and the Commission's regulations 16 VAC 30-100-10/80, available on our website at www.vwc.state.va.us

Applicable Roles: PEO Administrator User

Prerequisite Actions: None

Business Scenario:

1. Navigate to appropriate PEO.
2. Select the Annual Report Tab.

Contacts Coverage Clients **Annual Report**

■ Required annual report information needed

Annual Report Details

Final Virginia payroll reported for period ending 12/31/2009: 103695

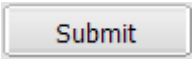
Name:

Street Address 1: City: State:

Street Address 2: Postal Code: Country:

☐ By checking this box you confirm that all of the information supplied herein is correct and up-to-date as of today

Cancel Submit

3. Complete the required data.
4. Check the Confirmation box to activate the  button.



By checking this box you confirm that all of the information supplied herein is correct and up-to-date as of today

Cancel

Submit